



**Golf Europe 2005**  
**International Trade Fair for Golf**  
**October 2-4, 2005**  
**Munich, Germany**

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## **Event Evaluation and Implications for Industry**

### **1. Summary**

Golf Europe is a specialized show for golf course owners and operators. At the 2005 event, there were 315 exhibitors from 25 countries and a total of 6,000 strictly in-the-trade visitors from 60 countries (up from 5,331 visitors from 51 countries in 2004). It is generally considered the leading golf show in Europe.

This year's show results and market research derived from its participants and relevant trade associations, reflected a growing market in Germany for the golf industry. Specifically:

- In Germany, sales of golf clubs, balls and shoes increased by 3% from \$188 million in 2004 to \$193 million in 2005.
- Golf clubs accounted for the largest share of sales at \$115 million and 72% of total sales, up \$12 million (17%) from the year before.
- Golf balls generated sales of \$29 million or 16% of total sales, with an annual sales increase of around \$1 million (3.2%).
- Golf shoes accounted for 9% of sales, increasing by 1.5% to \$15.5 million from \$14 million.
- Excellent opportunities exist for U.S. firms in the German and European golf markets. U.S.-made golf equipment is highly regarded in the sophisticated, quality-conscious European market.

### **2. The European Market**

Customers in Europe spent \$650 million for clubs, \$170 million for golf balls, \$112 million for shoes, \$75 million for golf bags, and \$56 million for gloves. In terms of units, that means that 6.9 million dozen golf balls, 6.3 million clubs, 6 million pairs of gloves, 1.6 million pairs of shoes and 765,000 golf bags left the stores. Going into detail on club sales: 1.4 million woods, 4.7 million irons and over 661,000 putters were sold in 2005. Total sales for woods were \$317.5 million, for irons \$262.5 million, and 70 million for putters.

### **3. Golfers and Golf Courses in Europe in 2005**

At the end of 2005, there were more than 3.8 million golfers and over 6,110 golf courses in operation in Europe. Among the 29 countries in the European Golf Association, 16

had more than 20,000 golfers. Together, these countries account for more than 95% of the total European golf market.

In 2005, the number of European golfers rose by almost 197,000, an increase of 4.7% over the previous year. The European countries with the highest increases in both golfers and golf courses are the UK, Germany and Sweden.

#### **4. Market Trends**

For the current golf season, a golf sport marketing survey makes the following sales prognoses, based on recent interview with golfers:

Golf balls:	Sweden stable, growth in Germany, decline in France
Woods:	growth in Sweden and Germany, decline in France
Putter:	growth in Sweden and Germany, decline in France
Golf bags:	growth in Germany, decline in Sweden and France
Gloves:	growth in Germany and Sweden, decline in France

#### **Pro Shops continue to lose share in Germany and the UK**

In the last twelve months, pro shops have continued to lose share of the club market in Germany and the UK, while remaining steady in France. Driving ranges and their retail outlets have gained share in the UK during this period.

In Germany, there has also been an increase in the percentage of purchases taking place at the Kaufhof department store chain, while the Karstadt department store chain continues to perform strongly.

#### **Purchases abroad in Germany**

In contrast to France and the UK, German golfers purchase a greater proportion of their equipment overseas, with over 10% of purchases of irons, putters and shoes being made this way. The 2005 data show that the pattern is consistent with that of 2004.

#### **Access to the Internet**

Access to the Internet has grown in Germany. Online purchasing of golf-related items in Germany has grown from 15% to 20% over the last 12 months.

#### **5. Number of European Courses**

Switzerland	78
Belgium	79
Finland	101
Norway	116
Austria	118
Netherlands	124
Denmark	139
Spain	263
Italy	265
Ireland	405
Sweden	427
France	530
Germany	665
Great Britain	2,615

## 6. Number of European Registered Golfers

Switzerland	39,948
Belgium	43,095
Austria	63,716
Italy	66,920
Norway	84,587
Finland	85,598
Denmark	104,848
Netherlands	175,110
Spain	196,123
Ireland	231,837
France	301,997
Germany	399,897
Sweden	503,856
Great Britain	1,212,803

## 7. Trade promotion opportunities

U.S. firms should find excellent opportunities in the the German and European golf markets. U.S.-made golf equipment is highly regarded in the sophisticated, quality-conscious German market.

In Germany, trade fairs play a major role in product marketing, and U.S. companies wishing to penetrate the market are encouraged to exhibit (or at least visit) a specialized German fair. For U.S. manufacturers and exporters of golf supplies and equipment, the leading show in Germany is the Golf Europe trade fair in Munich, a specialized show for golf course owners and operators. At the 2005 event, there were 315 exhibitors from 25 countries and a total of 6,000 strictly in-the-trade visitors from 60 countries.

U.S. firms are encouraged to exhibit at Golf Europe a potentially excellent market entry vehicle for the European golf market. The next Golf Europe trade show, Golf Europe 2006, will be held on September 29 to October 1, 2006.

The Munich trade fair corporation organizes the show:

Messe Muenchen International GmbH  
Contact: Mr. Armin Wittmann, Exhibitor Director, Golf Europe  
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The official representatives of the Munich Trade Fair Corporation in the United States are:

Munich Trade Fairs North America Corp.  
120 South Riverside Plaza, Suite 1460  
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Internet: <http://www.munichtradefairs.com>

## **8. Special event during Golf Europe 2005**

U.S. Commercial Service (CS) Munich and ITA (Office of Consumer Goods) again organized an American Product Center at Golf Europe 2005 in Munich, Germany. In this center, CS/GTP displayed the brochures and samples of 4 U.S. companies, which included 3 new-to-export and new-to-market companies, and registered 58 business visitors from over 17 countries: Germany, Italy, Slovakia, Iceland, Slovenia, England, France, Spain, Luxemburg, the Netherlands, Czech Republic, Ireland, Korea, Switzerland, Austria, South Africa, Sweden and the United States. Over 150 APC brochures were delivered to interested buyers during the three trade show days. A leading golf trade publication took pictures of the products in our APC and will run them in the November/December 2005 issue.

Due to the solid success of the American Product Center at Golf Europe 2005, it is recommended that such a booth again be organized at the 2006 show.

For more information on the American Product Center in the year 2006, contact the following U.S. Department of Commerce officer:

Ms. Amanda Ayvaz  
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Export Promotion Specialist  
Global Trade Programs  
U.S. Department of Commerce  
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Internet: <http://www.export.gov/ocg>

Additional market and contact information for the German golf industry and on U.S. Department of Commerce export assistance, can be obtained from:

Bernd Kietz  
U.S. Commercial Service  
American Consulate General  
Koeniginstrasse 5  
80539 Munich, Germany

Phone: (011-49) 89-2888-751  
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Internet: <http://www.buyusa.gov/germany/en>

Please also visit our web site at [www.usatrade.gov](http://www.usatrade.gov) and [www.buyusa.de](http://www.buyusa.de).

U.S. Commercial Service Munich recently submitted to the National Trade Data Bank (NTDB) a comprehensive industry sector analysis (ISA) which covers in detail the sporting and recreation equipment market, the fitness equipment market, the bicycle and accessories market in Germany. All three reports are available in the NTDB.

## **For More Information**

The U.S. Commercial Service Germany can be contacted via email at: [munich.office.box@mail.doc.gov](mailto:munich.office.box@mail.doc.gov), website: <http://www.buyusa.gov/germany/en/>.

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